

For Workgroup Managers: This guide will help you enroll (create), join (add), or edit users. This guide also covers unlocking users, resetting user passwords, and setting users offline.

Log into EDRS: Go to the EDRS website, www.edrs.doh.wa.gov and enter your login ID and password, then click **Log In**.

Important information to have before you create (enroll) a new user in the system:

- Workgroup name
- Unique (personal) email address
- Workgroup email (optional)
- License numbers for medical providers or funeral directors

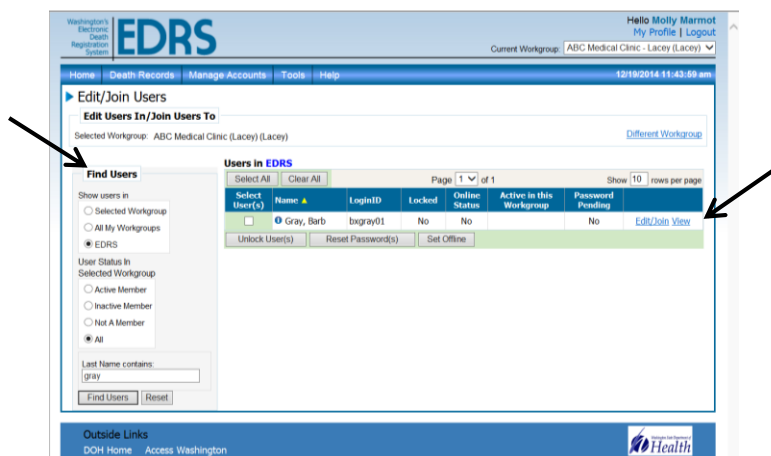
Create (Enroll) a New User in Your Workgroup:

1. From the blue **Menu** bar, hover your cursor over **Manage Accounts** and select **User – Create New** from the drop-down menu. (If you manage one workgroup move to step three.)
2. If you manage more than one workgroup, you will see a list of your workgroups. Click on the circle next to the workgroup you want to enroll the new user into and click **Next**.
3. Enter the new user's first name, middle initial, and last name. When finished click **Next**. You may see a page with listings of possible duplicate names. Review the listing and if you do not find a duplicate check the box next to **Create ___ as a new user in EDRS** and click **Next**.
4. Enter the individual's phone number and select **Phone Type** (office, fax, cell, home). Click on **Add Second Phone Number** to add another number and type (fax or cell). In the **email address** box, enter an email address that is unique to the individual. Note: This email address can be used only once in EDRS.
5. If you are enrolling a funeral home director enter the license number in the License Number field, add the title, and move to step seven. For funeral home staff being enrolled, enter the position; e.g. Office Manager, Funeral Director Intern, etc.
6. If you are enrolling a medical certifier, check the box for that individual's credential (MD, PAC, DO, PhD, or ARNP), then add the individual's medical license number in the **License Number** space (out-of-state licenses are acceptable). Use the state abbreviation at the beginning of the field, then the license number. The system automatically adds the suffix (MD, DO, PAC, ARNP, PhD) of the medical certifier on the death record. The **Title Box** is used to add other applicable titles, such as Clinic Director, Administrator, etc. Do not enter MD, PAC, DO, PhD, or ARNP in this field as it will appear twice on the death certificate. Click **Next**.
7. In **Roles Assignment**, check the appropriate box. Anyone who enters information into the system must have a **Data Entry** role. Click the **Approver** box for a funeral home director or medical certifier if a medical certifier, click the drop-down list for **Medical Certifier Class** and make the appropriate selection for this individual.
8. If your workgroup has designated a **Workgroup Email Address**, enter it in the **Workgroup Email Address User** field and check the box **Send email notification to this address**. A workgroup email address receives all the case notifications for the workgroup. The person or people checking the workgroup email inbox can forward the email notification to the appropriate approver. If you leave this blank, all email notifications will go to every member of your workgroup. Click **Next**.
9. If you entered a workgroup email, uncheck the box next to the user's email address.

10. Review what you have submitted so far. When everything is correct, click the **Submit** button.
11. A new review screen will appear. Notify the new user of their Login ID, found on the review screen. The user will automatically receive a temporary password at their email address.
12. You can now create a new user in the same workgroup by clicking on **Same Workgroup** or another workgroup by clicking on **Different Workgroup**. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.

Join (Add) an Existing User to Your Workgroup:

1. From the blue **Menu** bar, hover your cursor over **Manage Accounts** and select **Users-Edit/Join** from the drop-down menu. (If you manage one workgroup move to step three.)
2. If you manage more than one workgroup, you will see a list of your workgroups. Click on the circle next to the workgroup you want to enroll the new user into and click **Next**.
3. To find the user in EDRS that you want to join (add) to your workgroup; under **Show Users In**, click on the **circle next to EDRS**; under **User Status in Selected Workgroup** click on the **circle next to All**; enter the users last name and click **Find Users**.



4. Select the user you want to edit from the list and click **Edit/Join** in the right column by the user name.
5. Scroll down the page to **Workgroups Available for User to Join** near the bottom left of the screen and click **Join** next to the workgroup you are joining the user to.
6. In **Roles Assignment**, check the appropriate box. Anyone who enters information into the system must have a **Data Entry** role. Click the **Approver** box for a funeral home director or medical certifier if a medical certifier, click the drop-down list for **Medical Certifier Class** and make the appropriate selection for this individual.
7. If your workgroup has designated a **Workgroup Email Address**, enter it in the **Workgroup Email Address User** field and check the box **Send email notification to this address**. A workgroup email address receives all the case notifications for the workgroup. The person or people checking the workgroup email inbox can forward the email notification to the appropriate approver. If you leave this blank, all email notifications will go to every member of your workgroup. Click **Save Roles, Email and Status**.

8. **If you entered a workgroup email, uncheck the box next to the user's email address.**
9. Review what you have submitted so far. When everything is correct, click the **Submit** button.
10. A new review screen will appear, click **Close** in the upper right corner. You can now create a new user in the same workgroup or another workgroup. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS

Edit a User in Your Workgroup

1. After logging in to EDRS, go to the blue **Menu** bar, hover over **Manage Accounts**, and select **Users-Edit/Join** from the drop-down menu.
2. If you manage more than one workgroup, you will need to click the circle next to the workgroup you are adding the existing user to, Click **Next**.
3. Select the user you want to edit from the list and click **Edit/Join** in the right column by the user name.
4. On the page that opens, edit the information as necessary.
5. If you are editing roles, click the **Edit** link on the bottom right of the screen, make any changes necessary and click **Save Roles, Email and Status**, then click **Submit**.
6. Review the **User Summary** page and click **Close**.
7. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.

Inactivate/Activate a User in Your Workgroup

1. After logging in to EDRS, go to the blue **Menu** bar, hover over **Manage Accounts**, and select **Users-Edit/Join** from the drop-down menu.
2. If you manage more than one workgroup, you will need to click the circle next to the workgroup you are adding the existing user to, Click **Next**.
3. Select the user you want to inactivate/activate from the list and click **Edit/Join** in the right column by the user name.
4. On the bottom right of the page, you will see the list of workgroups this user is a member of. Next to the appropriate workgroup, click **Edit** in the **Roles/Email** column.
5. In the middle of the page, on the right, you will see **User's Status in Workgroup**. Click on the **InActive or Activate** circle and then click the **Save Roles, Email and Status** button and click **Submit**.
6. Review the **User Summary** page and click **Close**.
7. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.

Remove a User From Your Workgroup

1. After logging in to EDRS, go to the blue **Menu** bar, hover over **Manage Accounts**, and select **Users-Edit/Join** from the drop-down menu.
2. If you manage more than one workgroup, you will need to click the circle next to the workgroup you are adding the existing user to, Click **Next**.

3. Select the user you want to remove from the list and click **Edit/Join** in the right column by the user name.
4. In the **User is a Member of these Workgroups** section find the workgroup name you want to remove the user from and click **Remove** then click the **Submit** button.
5. Review the **User Summary** page and click **Close**.
6. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.

Reset a User Password

1. After logging in to EDRS, go to the blue **Menu** bar, hover over **Manage Accounts**, and select **Users-Edit/Join** from the drop-down menu.
2. If you manage more than one workgroup, you will need to click the circle next to the workgroup you are adding the existing user to, Click **Next**.
3. Under **Select User(s)** check the box next to the user's name you want to reset the password for then click **Reset Password**.
4. Confirmation of action window appears, click **OK**. An email will be sent to the user with a temporary password.
5. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.

Set a User Offline

1. After logging in to EDRS, go to the blue **Menu** bar, hover over **Manage Accounts**, and select **Users-Edit/Join** from the drop-down menu.
2. If you manage more than one workgroup, you will need to click the circle next to the workgroup you are adding the existing user to, Click **Next**.
3. Under **Select User(s)** check the box next to the user's name you want to set offline for then click **Set Offline**.
4. Confirmation of action window appears, click **OK**.
5. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.

Unlock a User

1. After logging in to EDRS, go to the blue **Menu** bar, hover over **Manage Accounts**, and select **Users-Edit/Join** from the drop-down menu.
2. If you manage more than one workgroup, you will need to click the circle next to the workgroup you are adding the existing user to, Click **Next**.
3. Under **Select User(s)** check the box next to the user's name you want to Unlock User(s) for then click **Unlock User(s)**.
4. Confirmation of action window appears, click **OK**. An email will be sent to the user with a temporary password.
5. If you are finished, make another selection from the blue **Menu** bar or logout of EDRS.